

How to use PST Files to manage your mailbox size

The Army-wide implementation of the Exchange 2003 email system will be limited in some ways. One such limitation is mailbox size. NETCOM has set mailbox size limits for its new email system. These limits will cause some users to employ a different email management strategy than what they've been used to.

Mailbox Size Limits

Mailbox Size	User Category	Description
100 Mb	Standard Users	All Email users except those below
500 Mb	Executive Users	Activity Directors, Deputy Directors, Commanders, Deputy Commanders, and other personnel as directed by the Garrison Commander (GC), Installation Commander (IC) or Commanding General (CG)
1 Gb	VIP Users	Garrison Commanders (GC), Installation Commanders, (IC), General Officers, (GO), Senior Executive Service (SES)

Given these limits, the DOIM is providing the following guidance to assist users in managing their mailbox size. Specifically, this document explains how to create and use PST files (also known as personal folders) to keep mail visible and organized but out of the user's mailbox.

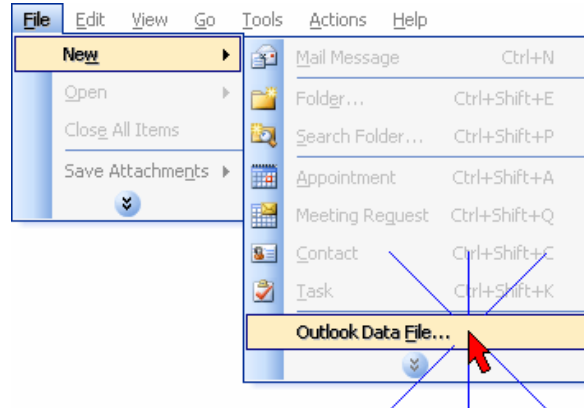
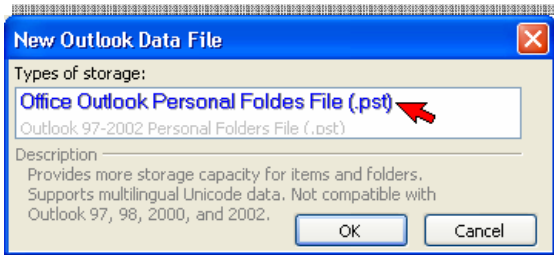
The following tasks are addressed in this document:

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1. [Create New PST files](#)
 2. [Create sub-folders to store mail items](#)
 3. [Move mail manually using drag and drop or copy and paste](#)
 4. [Move mail automatically using Rules](#)
 5. [Move mail using AutoArchive](#)
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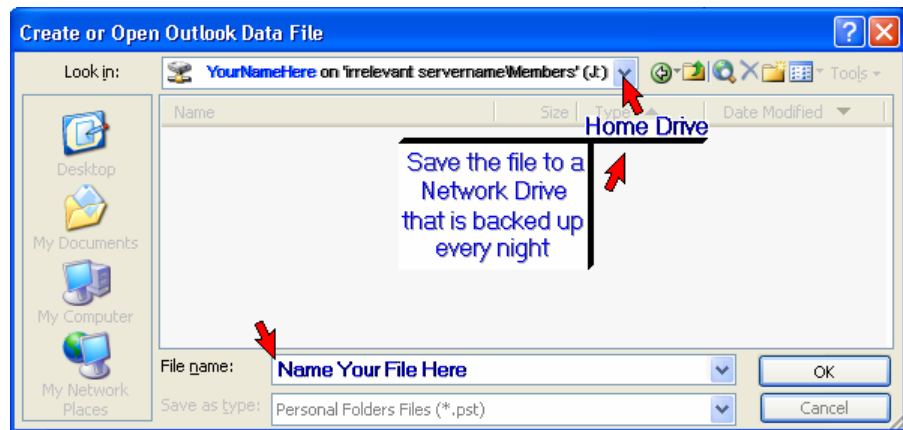
1. Create New PST Files in Microsoft Outlook

1. File | New Outlook Data File →

2. Select
Office Outlook Personal Folders File (.pst)



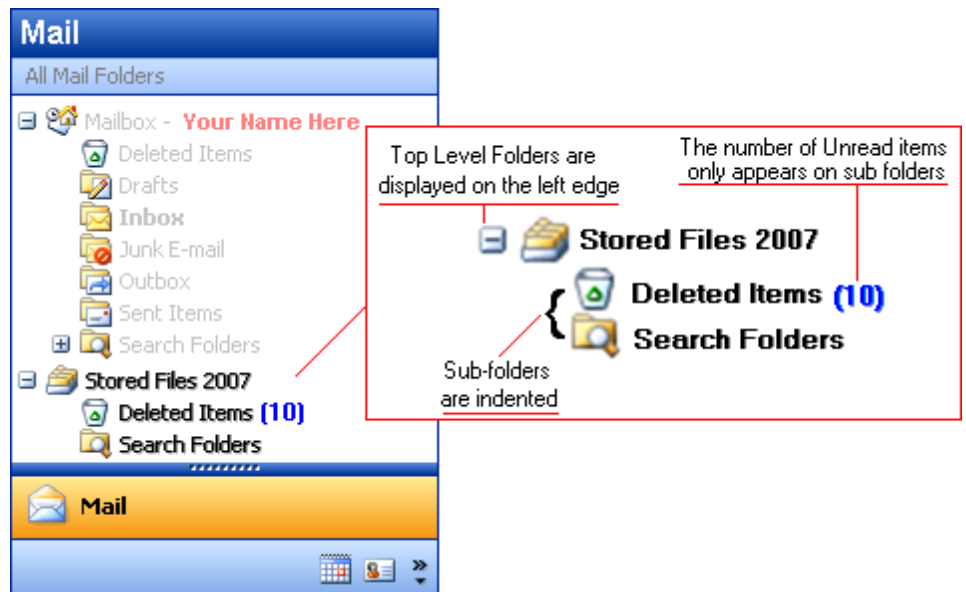
3. Name it/Save it →



Organize

When first created, a PST has only two containers; Deleted Items and Search Folders.

You could place items in either the top level folder, (Stored files 2007) or into the deleted items folder. However, that doesn't provide much organization, and there's a problem if you want to see how many unread items there are in a given folder. Top level folders can not display the number of unread items, only sub-folders can. This means if there are any unread items stored in a top level folder, there's no visual indication of it in the folder list.



Subfolders

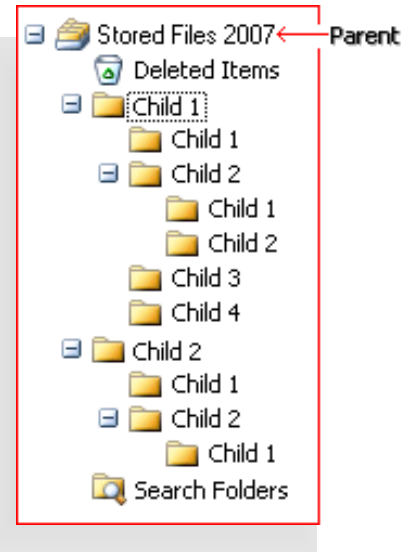
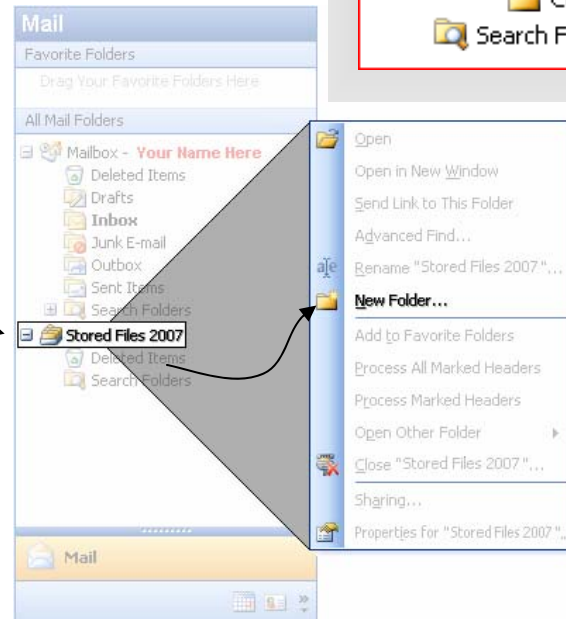
For better organization and more flexibility create sub-folders.

You can create thousands of folders in a PST file and you can have up to 64,000 messages in each folder, but the real limit for a PST file caps at about 2GB for the entire file. That's 20 thousand times bigger than the standard user's 100Mb mailbox.

2. Create Subfolders

The simplest way to create a sub-folder is to...

1. **Right-click** on the folder you want as the parent folder in the structure.
2. Then click **New Folder**.
3. **Name** the folder and click **OK** ➤



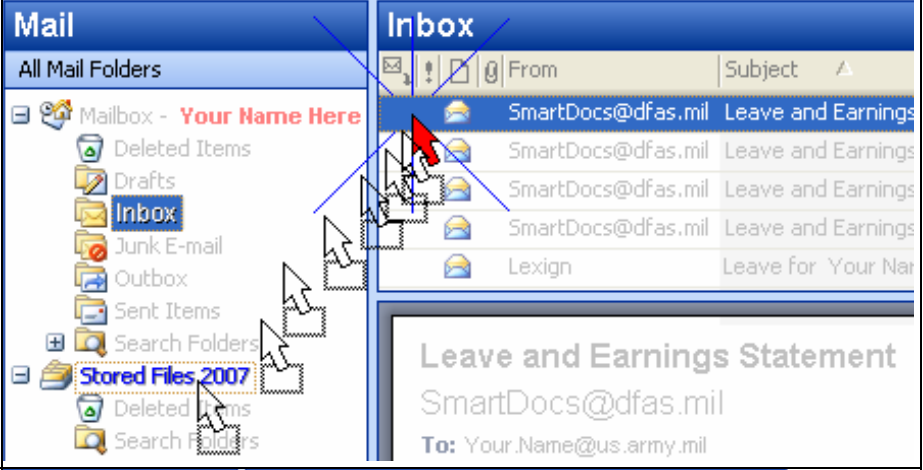
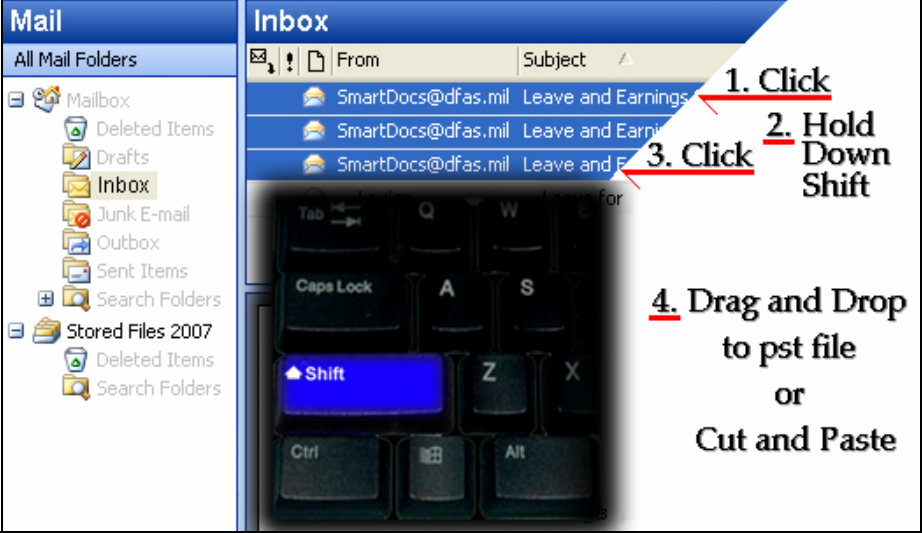
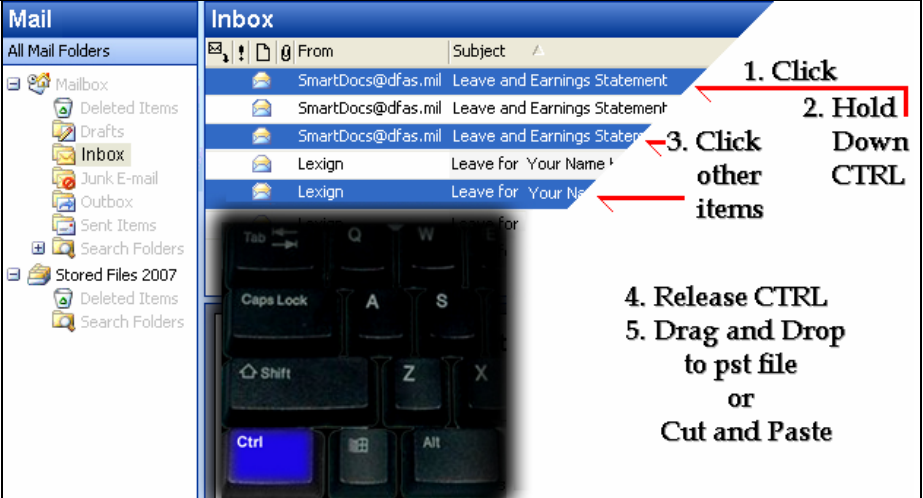
...and you have a new empty container in which to store mail items.

Move Mail

There are three basic ways of moving mail out of your mailbox into your PST folders.

1. Manually; Drag items from one folder to another or by use cut and paste.
2. Automatically; Create rules that will move specified incoming mail to locations you designate.
3. Archiving; Outlook's Auto Archive tool can move mail at a predetermined schedule.

3. Move Mail Manually

<p>1. To move a single item...</p> <p>...there are two basic methods; you can drag it from the right hand window pane to the desired folder on the left or select the item in the right hand window pane and use the cut command, then click on the folder on the left where you want to place it and use the paste command.</p>	
<p>2. To move several items that are together ...</p> <p>... in the right hand window pane, click either the top-most item or the bottom one, then hold the shift key down and select the opposite end item. This selects everything between the two clicks. Once selected, drag the group of items to the desired folder on the left or use cut and paste.</p>	
<p>3. To move a group of items not together...</p> <p>...in a list, select one, then hold the control key down while single clicking the other items you want to move. Again once you've selected the items, drag them from the right hand window pane to the desired folder on the left or use cut and paste.</p>	

4. Move mail automatically using Rules

In Microsoft Outlook, rules automatically handle incoming mail. Rules examine incoming messages to see if specific criteria are met. If so, the incoming message can be automatically moved to another folder, deleted, forwarded or anything else you could normally do with an incoming message.

Example

Illustrated below is only one example of the many uses for Outlook's **Rules and Alerts Wizard**.

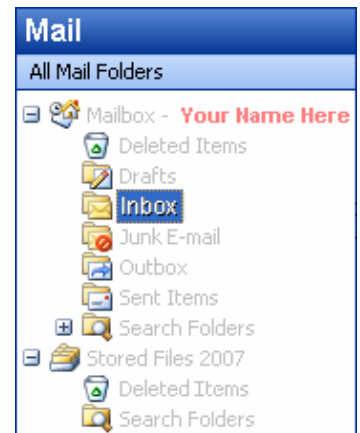
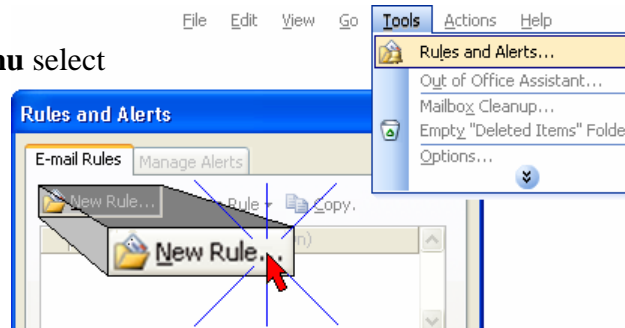
Every month I receive a leave and earnings statement. This example rule will be set up to move all incoming messages with the phrase "Leave and Earnings Statement" in the subject line to a pst file.

To create this new rule,

- ✓ Click on the **Inbox** folder in Outlook to ensure the new rule acts on all messages coming into the Inbox...

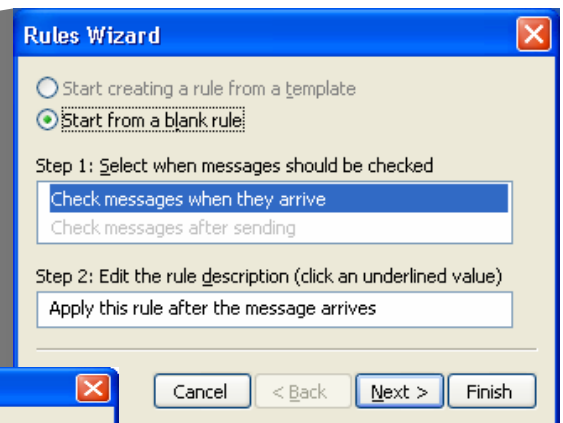
- ✓ From Outlook's **Tools** menu select **Rules and Alerts**

- ✓ In **Rules and Alerts** click **New Rule**.



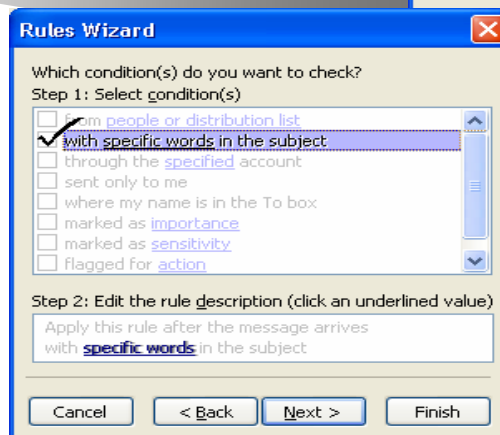
NOTE: *There are two steps to each part of this process.*

- ✓ Select **Start from a blank rule**
- ✓ Select **Check messages when they arrive**
- ✓ Click **Next**



- ✓ Place a check mark in "with specific words in the subject"

- ✓ ...in step 2 click the specific words link



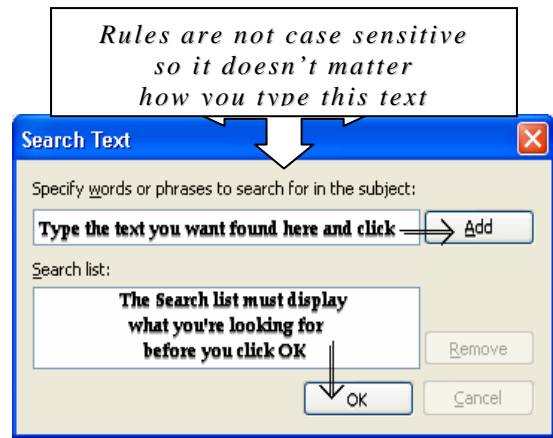
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- ✓ Enter words or phrases to search for
- ✓ Then click **Add** to place them on the search list

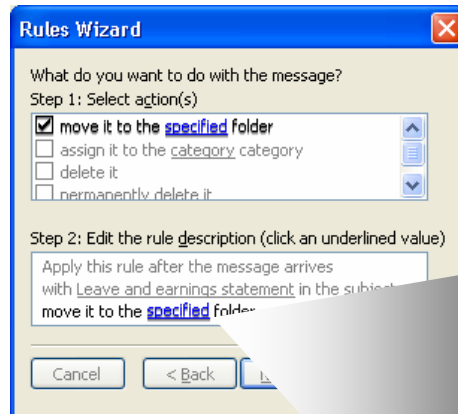
NOTE:

Populate the search list before you click **OK** →

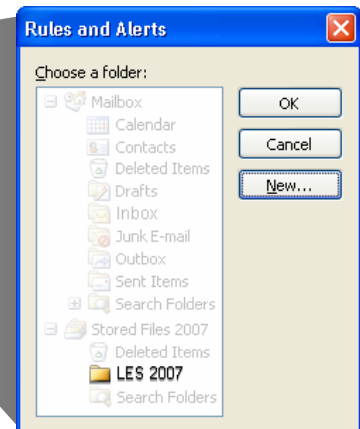


- ✓ In step 1 select
“Move it to the specified folder”

- ✓ In step 2 click the Specified link



- ✓ Select the destination folder for items that meet the criteria set above
- ✓ Click **OK**



This rule is complete and ready for review

- ✓ Step 1 - displays a name for the rule
- ✓ Step 2 –
 - Run this rule now on messages already in the Inbox
All items currently in the Inbox are checked to see if they match the criteria shown in step 3
 - Turn on this rule
...must be checked for this rule to fire. You have the option of turning rules on or off. A rule that forwards mail to my home account might only be useful when I'm not in the office. It can be turned off when I'm in the office but kept so I don't need to re-create it.
- ✓ Step 3 - Describes what the finished rule will do.
- ✓ Click **Finish**

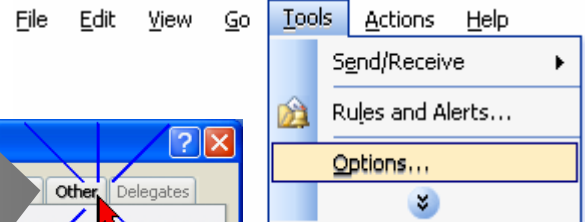


5. Move mail using AutoArchive

Moving Mail with the AutoArchive tool is probably the best method of the 3 because of the ‘set it and forget it’ nature of the tool. Once the AutoArchive tool is configured, it will automatically move old mail items from your inbox to a specified PST file at a predetermined interval helping you keep your mailbox size easier to manage.

To configure AutoArchive

- ✓ From Outlook’s **Tools** menu choose **Options**.
- ✓ From the tabs across the top of the Options dialog box select **Other** →

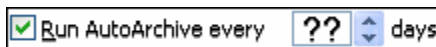


- ✓ Click the Auto Archive button



AutoArchive Settings

Running AutoArchive every week helps keep my mailbox size low. Some users may not need to run it that often but some may want to run it every day depending on the amount of email traffic received.



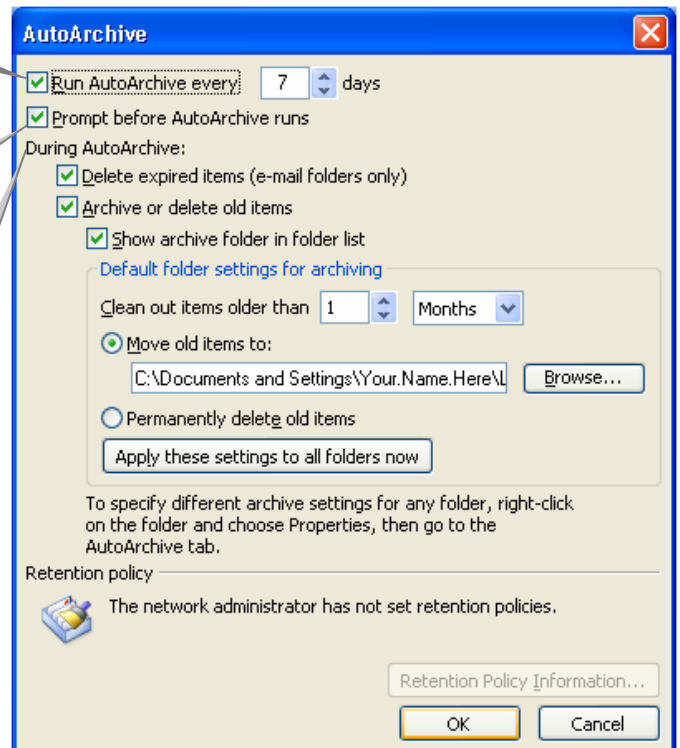
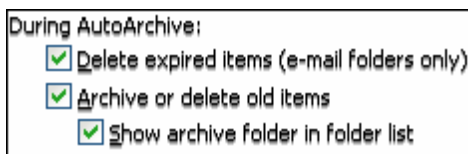
By selecting prompt before AutoArchive runs a dialog box is displayed informing you that old messages will be moved. In this case, I receive this prompt once a week.



During AutoArchive

Delete expired items (e-mail folders only)

Removes any expired email messages from your mailbox folders. Messages can be set to expire by the sender; though typically messages have no expiration date.



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Archive or delete old items

This is AutoArchive's ON switch.

If there is no check in this box, nothing will be moved.

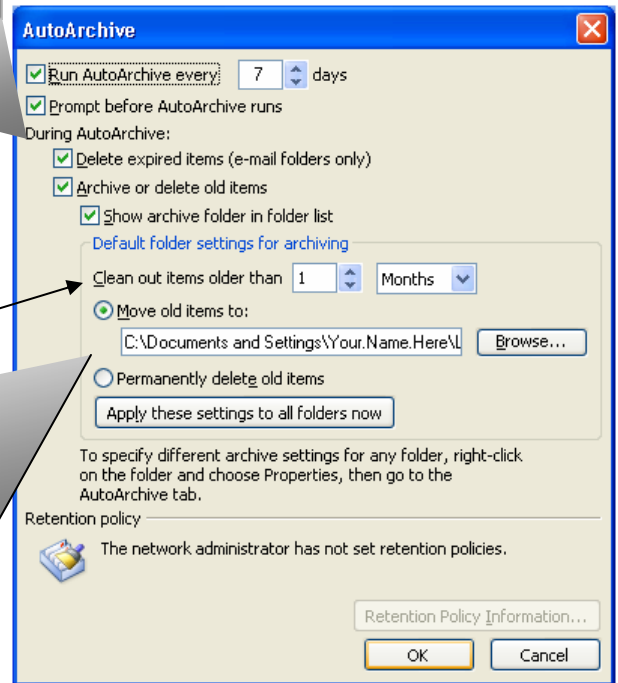
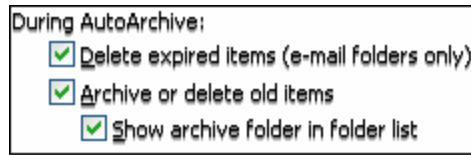
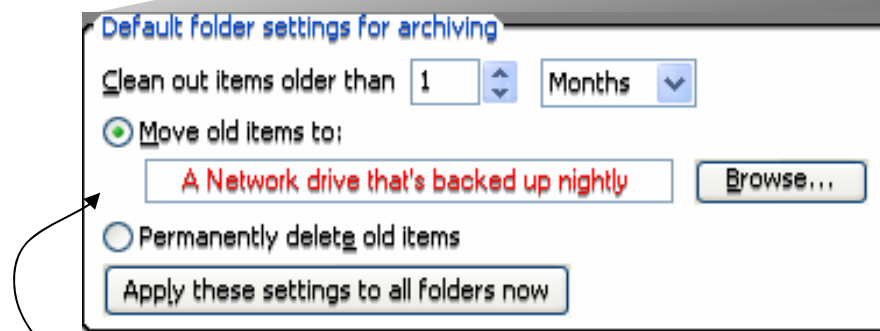
Show archive folder in folder list

A check here displays the archive PST file along with your mailbox and other PST files.

Default folder settings for archiving

Clean out items older than - Set how old a message has to be before AutoArchive will move or delete it.

- ☒ Move old items to
- ☒ Permanently delete old items



The last choice to make is whether to move old items or permanently delete them. If you select the option to permanently delete old items, that's exactly what this tool will do. But if you choose to move old items, then you must tell AutoArchive where you want them moved. The best location to save your archive PST file is to a **network drive that is backed up every night**. If you do not have a home drive, ask your IMO for assistance.

WARNING!

Saving your PST files on your local hard drive runs the risk of losing all your data in the event of a catastrophic hard disk failure

Once you've set the parameters in this dialog box, click **OK** and forget it. Outlook will continue to archive your old items until you change these settings.